

SAP Item #6B: Legacy Transfer Units in MAXT Course Exclusions

User Acceptance Testing (UAT) for Maximum Attempted Units Test

UAT Kick-Off Session

Session Date/Time: 10am to 11:30am on 10/31/2023

Webex UAT Session Recording: <https://sbctc.webex.com/webappng/sites/sbctc/recording/3899b39e5a3d103ca6f2d289e29a95ca/playback>

Slide Deck:



[2023-10-31 SAP 6B - UAT - Legacy Transfer Uni.pptx](#)

Key UAT Dates

UAT Testing Period: 10/31 to 11/13

UAT Sign-Off: Due by 7pm on 11/13/2023

UAT Sign-Off Survey: <https://www.surveymonkey.com/r/WKMPWG6>

Please ensure only one response is submitted per college that participated in testing.

Target Implementation: 11/28/2023

Testing Environment

Link to PQA Environment: <https://pt-pqa.peoplesoft-nonprod-aws.ctclink.sbctc.edu/ptpqa/signon.html>

Last Refresh Date: 10/19/2023

Username: Your EMPLID

Password: *[shared with testers after the session]*

Questions?

Email Amanda Hoover (ahover@sbctc.edu) and CC Ana Ybarra (aybarra@sbctc.edu)

Trouble Logging In?

Email Caitlin Stein (cstein@sbctc.edu)

Need to Report an Issue?

Submit a ticket to the Service Desk and provide as many details as possible, including screenshots, IDs used, and steps taken to produce the issue or error.

Link to ticketing system: <https://servicedesk.sbctc.edu/>

Request Type: ctcLink Support > Testing

Subject: UAT – FA SAP Legacy Data in MAXT – [description of issue]

SAP Process Overview

Eight tests are used to determine a Satisfactory Academic Status (SAP) status. Depending on the tests a college has activated, one or more tests will be executed when the SAP Process is run for an individual student or batch of students. The possible tests are:

- Academic Standing
- **Maximum Attempted Units***
- Maximum Attempted Terms
- Minimum Current GPA
- Minimum Cumulative GPA
- Current Earned Units
- Cumulative Earned Units
- Two Year GPA

*** The focus of this testing activity is isolated to the Maximum Attempted Units Test.**

 While there are other areas in the SAP program reported as having issues, they are being handled separately through enhancements being addressed through the larger FA SAP Maintenance Item list from FAST.

Maximum Attempted Units Test Functionality

Maximum Attempted Units Test Configuration

- References the Maximum Attempted Units Test configurations on the Criteria 1 tab of the SAP Define Set Up page, and calculates based on the configurations on the Course Exclusions page.
- Calculates the total Maximum Attempted Units value and assigns a SAP Status for the test based on unit ranges defined in the college's local configuration.

Image: Maximum Attempted Units configuration on SAP Define Set Up Criteria 1 page

Navigation: Set Up SACR > Product Related > Financial Aid > Satisfactory Academic Progress > Define Set Up Criteria >> Criteria 1 tab

Maximum Attempted Units Test

Use Max Attempted Units Test

Activates the Maximum Attempted Units Test

Max Attempted Units Option

Maximum Attempted Transfer Unit Criteria

Towards GPA No GPA Course Credit TC Units Adjust

Test Credit Other Credit

Options to include various forms of Transfer Units in the Maximum Attempted Units value calculated by the SAP program

Max Attempted Units Rules Personalize | Find | View All | First 1-5 of 18 Last

| Academic Program | Academic Plan | Attempted MAX Units From | Attempted MAX Units To | SAP Status | | |
|------------------|---------------|--------------------------|------------------------|------------|---|---|
| ACADM | | 113.001 | 135.000 | MAXW | + | - |
| ACADM | | 135.001 | 999.999 | MAXT | + | - |
| ACADM | CHEBCA | 132.001 | 159.000 | MAXW | + | - |
| ACADM | CHEBCA | 159.001 | 999.999 | MAXT | + | - |
| ACADM | CRMHSA | 122.001 | 147.000 | MAXW | + | - |

Range of Maximum Attempted Units this test will apply to

SAP Status to be assigned if student meets these criteria

Course Exclusions Configuration

- College-specific list of all courses that should be excluded from the total Maximum Attempted Units value and designate them as “Remedial” or “ESL” Course Types
- Option to define a maximum number of units that can be excluded for “Remedial” and/or “ESL” Course Types
- This configuration is only utilized by the Maximum Attempted Units Test

Image: Course Exclusions configuration for the Maximum Attempted Units Test on Exclusions page

Navigation: Set Up SACR > Product Related > Financial Aid > Satisfactory Academic Progress > Define Set Up Criteria >> Exclusions tab

Course Exclusions

Use Course Exclusions Activates the use of Course Exclusions (used in the Maximum Attempted Units Test only)

Max Units to Exclude

Max ESL Units to Exclude

Max Remedial Units to Exclude Maximum number of units that can be excluded from the total Maximum Attempted Units value, based on Course Type in the configuration below. (Blank means no limit.)

Course Exclusions Personalize | Find | View All | | First 1-5 of 66 Last

| *Course ID | *Offer Nbr | | | *Course Type | | |
|------------|--------------------------------|-------|----|--------------|--|--|
| 062065 | <input type="text" value="1"/> | EFUND | 48 | Remedial | | |
| 062072 | <input type="text" value="1"/> | ELP | 60 | Remedial | | |
| 062073 | <input type="text" value="1"/> | ELP | 63 | Remedial | | |
| 062082 | <input type="text" value="1"/> | HORT | 86 | Remedial | | |
| 062104 | <input type="text" value="1"/> | HUMAN | 11 | Remedial | | |

Export list of Course Exclusions to spreadsheet for review

List of Courses to be excluded from the total Maximum Attempted Units value and categorized by Course Type

Course Type options (Remedial or ESL). These correspond to the Max Units to Exclude configurations.

Colleges should maintain the Course Exclusions list as Remedial and/or ESL courses are added at the college. You can export the Course Exclusions list to a spreadsheet and compare against a list provided by your college's Registrar to identify any courses that may need to be added or adjusted.

Please remember to always add an effective dated row to your SAP setup prior to making any changes, even if it is just to change the Course Type on a course on the Exclusions tab.

Maximum Attempted Units on the Student SAP Page

- Located in the SAP Calculation Results section of the Maintain Student SAP Data page
- Displays the total Maximum Attempted Units value up to the term being evaluated
- Course Exclusions apply to this value, per local college configurations
- Displays information in the "Rule Range" fields if the student matches a Max Attempted Units Rule

Image: Maximum Attempted Units test results on Maintain Student SAP Data page

| SAP Calculation Results | | | | | | | | | | |
|-------------------------|------|---------|-----------------|---------------|-------------------------------------|--------|----------|----------------|------|--|
| Test | Used | Actual | Rule Range From | Rule Range To | Failed | Status | Severity | Exception Used | Term | |
| Academic Standing | N | | NA | NA | <input type="checkbox"/> | | | NA | | |
| Maximum Attempted Units | Y | 145.000 | 144.001 | 999.999 | <input checked="" type="checkbox"/> | MAXT | 70 | N | NA | |
| Maximum Attempted Terms | N | | | | <input type="checkbox"/> | | | N | NA | |
| Minimum Current GPA | Y | 2.700 | | | <input type="checkbox"/> | MEET | 10 | N | NA | |
| Minimum Cumulative GPA | Y | 3.030 | | | <input type="checkbox"/> | MEET | 10 | N | NA | |
| Current Earned Units | Y | 3.000 | | | <input type="checkbox"/> | MEET | 10 | N | NA | |
| Cumulative Earned Units | Y | 118.000 | | | <input type="checkbox"/> | MEET | 10 | N | NA | |
| Two Year GPA | N | 3.030 | | | <input type="checkbox"/> | | | N | NA | |

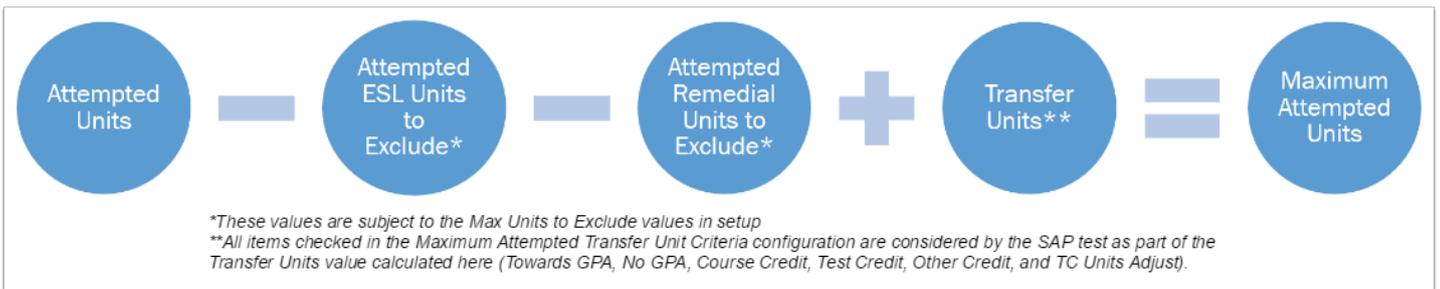
Maximum Attempted Units Test - Delivered Logic Flow

The Maximum Attempted Units Test configurations work in tandem with the Course Exclusions setup, so long as both are enabled. This test calculates the Maximum Attempted Units value following the logic as outlined below.

1. Check that the Maximum Attempted Units Test is enabled
 - a. **If** it is enabled, **then** proceed
 - b. **If** it is not enabled, **then** skip test
2. Retrieve the Total Enrolled Attempted Units from Student Enrollment (STDNT_ENRL)
3. Determine total units from Student Enrollment in courses that are listed in the Course Exclusions of SAP setup
4. Compare the total Enrolled ESL Units against the Max ESL Units to Exclude value, if Course Exclusions is enabled
 - a. **If** the total Enrolled ESL Units is *greater than* the Max ESL Units to Exclude value, **then** the ESL units to exclude *is equal to* the Max ESL Units to Exclude value
 - b. **If** the total Enrolled ESL Units is *less than* the Max ESL Units to Exclude value, **then** the ESL units to exclude *is equal to* the sum of all Enrolled ESL Units from the Course Exclusions list
 - c. **If** the Max ESL Units to Exclude value is blank, **then** the Enrolled ESL units to exclude *is equal to* the sum of all Enrolled ESL Units from the Course Exclusions list
5. Compare the total Remedial Units against the Max Remedial Units to Exclude value, if Course Exclusions is enabled
 - a. **If** the total Enrolled Remedial Units is *greater than* the Max Remedial Units to Exclude value, **then** the Enrolled Remedial units to exclude *is equal to* the Max Remedial Units to Exclude value
 - b. **If** the total Enrolled Remedial Units is *less than* the Max Remedial Units to Exclude value, **then** the Enrolled Remedial units to exclude *is equal to* the sum of all Enrolled Remedial Units from the Course Exclusions list

- c. **If** the Max Remedial Units to Exclude value is blank,
then the Enrolled Remedial units to exclude *is equal to* the sum of all Enrolled Remedial Units from the Course Exclusions list
6. Calculate the **Maximum Attempted Units**:
7. Total Enrolled Attempted Units (step 2) **minus** Enrolled ESL Units to Exclude (step 4) **minus** Enrolled Remedial Units to Exclude (step 5)
8. Calculate the total Transfer Units per the local configuration of the Maximum Attempted Transfer Unit Criteria
 - a. **If** the Towards GPA box is checked
then add the total Towards GPA Transfer Units from Student Term History (STDNT_CAR_TERM)
 - b. **If** the No GPA box is checked
then add the total No GPA Transfer Units from Student Term History (STDNT_CAR_TERM)
 - c. **If** the Course Credit box is checked
then add the total Course Credit Transfer Units from Student Term History (STDNT_CAR_TERM)
 - d. **If** the Test Credit box is checked
then add the total Test Credit Transfer Units from Student Term History (STDNT_CAR_TERM)
 - e. **If** the Other Credit box is checked
then add the total Other Credit Transfer Units from Student Term History (STDNT_CAR_TERM)
 - f. **If** the TC Units Adjust box is checked
then *subtract* the total TC Units Adjust Transfer Units from Student Term History (STDNT_CAR_TERM)
9. Calculate the **final Maximum Attempted Units** value by adding the Total Transfer Units from step 7 to the Enrolled Attempted Units in step 6
10. Compare the student's **Maximum Attempted Units** value against the ranges specified in the locally configured Max Attempted Units Rules
 - a. **If** the student data matches one of the rules,
then assign the corresponding SAP Status, per the local configuration, for the Maximum Attempted Units Test
 - b. **If** the student data does not match one of the rules,
then assign the Career Pass Default Status (configured on the Setup tab of the Define Set Up Criteria page) for the Maximum Attempted Units Test

Image: High-level visual representation of the delivered Maximum Attempted Units Test calculation of the Maximum Attempted Units value



i The Maximum Attempted Units Test was modified in the project [SAP #3: MAXT with Developmental Credits over 45](#). That customization resolved a [known Oracle bug](#) that would cause the Cumulative Attempted Units value to be a negative number. It also resolved issues with the Maximum ESL Units to Exclude and Maximum Remedial Units to Exclude configurations.

The Problem

Non-converted legacy data is manually entered by the colleges as transfer credit. This legacy data is not stored in the student's enrollment record. However, the Maximum Attempted Units Test is designed to exclude courses on the enrollment record; it does not exclude courses entered in as transfer credit. As a result, legacy courses at the college are not excluded from the final Maximum Attempted Units value, per the college's local configuration, which can cause students to inaccurately fail the Maximum Attempted Units Test, or at the very least have an inaccurate Maximum Attempted Units value.

The SAP program uses the following records in order to calculate the Maximum Attempted Units value:

- **Term History Cumulative Statistics (STDNT_CAR_TERM)** Used by the SAP program to count the total units for the Maximum Attempted Units Test.
- **Test Credit Extract View (TEST_EXTR2_VW)** Used by the SAP program to count the total units for the Maximum Attempted Units Test.
- **Other Credit Extract View (OTHR_EXTR2)** Used by the SAP program to count the total units for the Maximum Attempted Units Test.
- **Student Enrollment (STDNT_ENRL)** Used by the SAP program to determine the number of units to exclude based on the Course Exclusions configuration from the Cumulative Attempted Units value.

In the ctLink system, Legacy units are manually entered as transfer units. However, transfer units do not exist on the Student Enrollment (STDNT_ENRL) record, which is used when determining courses to exclude. This means that if a student took courses at the college while the college was still using the legacy system, then all those units are counted against the

student's Cumulative Attempted Units; they are not compared against the college's local Course Exclusions configuration.

The delivered functionality will not identify those units as having been attempted at the college, and therefore will not exclude them from the Maximum Attempted Units value as it has been configured for the college. This can cause students to meet their Maximum Attempted Units limit prematurely.

Student Example (The Problem)

In the unofficial transcript excerpts below for this student example, we can see a total of 8 attempted remedial units that should be excluded from the student's Maximum Attempted Units value. We can also see that these terms were prior to the college's conversion into ctLink.

| SUMMER 1992 (06/22/1992 - 09/11/1992) | | | | | | |
|---------------------------------------|-------|-------------------------|-----------|--------|-----------------|---------------|
| Course | | Description | Attempted | Earned | Grade | Points |
| OFF | 106 | Word Proc Applications | 3.000 | 0.000 | W | 0.000 |
| OFF | 214 | Wordperfect On Ibm-Pc | 5.000 | 5.000 | 3.3 | 16.500 |
| READ | 57 | Individual Read Develop | 3.000 | 3.000 | CR | 0.000 |
| WRIT | 93 | Paragraph/Essay Writing | 3.000 | 3.000 | CR | 0.000 |
| Term GPA | 3.300 | Term Totals | 14.000 | 11.000 | GPA Units 5.000 | Points 16.500 |

| FALL 1992 (09/21/1992 - 12/11/1992) | | | | | | |
|-------------------------------------|-------|-----------------------|-----------|--------|-----------------|---------------|
| Course | | Description | Attempted | Earned | Grade | Points |
| BUSN | 121 | Practical Accounting | 5.000 | 5.000 | 3.3 | 16.500 |
| LEGAL | 100 | Legal Asst Profession | 1.000 | 1.000 | CR | 0.000 |
| LEGAL | 101 | Intro To Legal System | 4.000 | 4.000 | 1.8 | 7.200 |
| READ | 91 | Study Skills Modules | 1.000 | 1.000 | CR | 0.000 |
| Term GPA | 2.633 | Term Totals | 11.000 | 11.000 | GPA Units 9.000 | Points 23.700 |

| WINTER 1995 (01/03/1995 - 03/17/1995) | | | | | | |
|---------------------------------------|-------|----------------------|-----------|--------|-----------------|---------------|
| Course | | Description | Attempted | Earned | Grade | Points |
| LEGAL | 105 | Contracts | 3.000 | 3.000 | 2.8 | 8.400 |
| LEGAL | 106 | Torts | 3.000 | 3.000 | 3.5 | 10.500 |
| LEGAL | 205 | Civil Litigation | 3.000 | 3.000 | 3.4 | 10.200 |
| MATH | 82 | Pre-Algebra | 1.000 | 0.000 | W | 0.000 |
| PE | 104 | Fitness Conditioning | 1.000 | 0.000 | W | 0.000 |
| PE | 123 | Weight Training | 1.000 | 0.000 | W | 0.000 |
| Term GPA | 3.233 | Term Totals | 12.000 | 9.000 | GPA Units 9.000 | Points 29.100 |

We have confirmed that these courses were not converted, and were manually entered as transfer units by viewing the Academics tab on the Student Services Center. Units are listed here as "From Transfer Credit".

Image: Academics tab of the Student Services Center (Student) page

Navigation: Campus Community > Student Services Ctr (Student) >> Academics tab

SUMMER 1992

Eligible to Enroll No
 Primary Program PRFTC Professional Technical
 Academic Standing Status Data unavailable

▼ Level / Load
 Academic Level - Projected Freshman
 Academic Level - Term Start Freshman
 Academic Level - Term End Freshman
 Approved Academic Load Full-Time
 Academic Load No Unit Load

▼ Classes
 No classes for this term.
[Quick Enrollment](#)

▼ Statistics

| | From Transfer Credit | Cumulative Total |
|--------------------------|----------------------|------------------|
| Units Toward GPA: | | |
| Taken | 5.000 | 5.000 |
| Passed | 5.000 | 5.000 |
| In Progress | | |
| Units Not for GPA: | | |
| Taken | 9.000 | 9.000 |
| Passed | 6.000 | 6.000 |
| In Progress | | |
| Transfer Units | 11.000 | 11.000 |
| GPA Calculation | | |
| Total Grade Points | 16.500 | 16.500 |
| / Units Taken Toward GPA | 5.000 | 5.000 |
| = GPA | 3.300 | 3.300 |

If you have access to the Course Credits - Manual page for transfer credit evaluations in the Records and Enrollment module, then you will also be able to see confirmation that this is in fact legacy data. The key component here is that these transfer credits are being transferred from the college to that same college, which is how these are manually entered in ctclink to keep the record of a student's prior enrollment history at the college from the legacy data system.

Image: Example of legacy data manually entered on the transfer credits table

Navigation: Records and Enrollment > Transfer Credit Evaluation > Course Credits - Manual >> Transfer Course Entry tab

When we look at this student's Maintain Student SAP Data page, we can see that they have failed the Maximum Attempted Units test, because their calculated Maximum Attempted Units value falls within the Max Attempted Units Rules range for this Academic Program/Academic Plan combination. As a result, their final SAP Status is 'MAXT', and they are no longer eligible for financial aid.

Upon further exploration, we learn that while 145.000 is their total attempted units, 8 of those units are considered remedial and should have been excluded from this number. However, these 8 units are on the transfer credit table as manually entered legacy data.

Image: Example student's inaccurate Maximum Attempted Units values prior to the customization

Navigation: Financial Aid > Satisfactory Academic Progress > Maintain Student SAP Data

Term 2233 SPRING 2023 Updated
 Program PRFTC Professional Technical User ID
 Plan ACTVCAPT Graphic Design AAS

Calc SAP Status MAXT Maximum TimeFrame Exceeded

Override SAP Status

Packaging Status Summary Meeting Satis Acad Progress [View Packaging Status Summary](#)

Comments

SAP Calculation Results

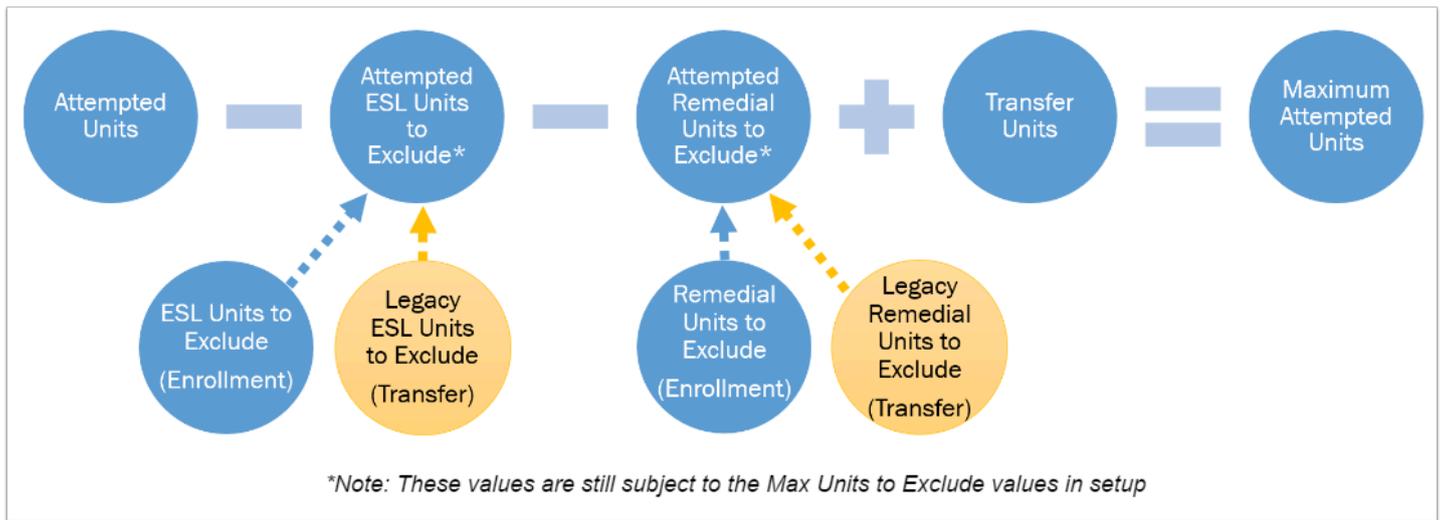
| Test | Used | Actual | Rule Range From | Rule Range To | Failed | Status | Severity | Exception Used | Term |
|-------------------------|------|---------|-----------------|---------------|-------------------------------------|--------|----------|----------------|------|
| Academic Standing | N | | NA | NA | <input type="checkbox"/> | | | NA | |
| Maximum Attempted Units | Y | 145.000 | 144.001 | 999.999 | <input checked="" type="checkbox"/> | MAXT | 70 | N | NA |
| Maximum Attempted Terms | N | | | | <input type="checkbox"/> | | | N | NA |
| Minimum Current GPA | Y | 2.700 | | | <input type="checkbox"/> | MEET | | | NA |
| Minimum Cumulative GPA | Y | 3.030 | | | <input type="checkbox"/> | MEET | | | NA |
| Current Earned Units | Y | 3.000 | | | <input type="checkbox"/> | MEET | | | NA |
| Cumulative Earned Units | Y | 118.000 | | | <input type="checkbox"/> | MEET | 10 | N | NA |
| Two Year GPA | N | 3.030 | | | <input type="checkbox"/> | | | N | NA |

The Solution

Create a custom view to identify legacy units and corresponding course information added manually in ctcLink. Clone the delivered PeopleSoft Financial Aid SAP Application Engine (AE) for the Maximum Attempted Units Test. Modify the copied code to compare the custom view against additional delivered enrollment tables to pull the data points necessary to compare these legacy transfer units to the Course Exclusions configuration. Update the SAP AE Process Setup configuration page for each institution to point to the custom code.

High-Level Diagram of Customized Maximum Attempted Units Calculation

Image: High-level visual representation of the customized Maximum Attempted Units Test calculation of the Maximum Attempted Units value



Student Example (The Solution)

In the screenshot below, the same example student's SAP for Spring 2023 has been calculated again in an environment with the customization in place. The student is now meeting the Maximum Attempted Units Test, and as a result is also meeting SAP for the term. We can see that the Maximum Attempted Units value has updated to 137.000, as expected - the 8.000 legacy remedial units have been reduced from the 145.000 Maximum Attempted Units value.

Image: Example student's new Maximum Attempted Units Test outcome with the customization in place

Navigation: Financial Aid > Satisfactory Academic Progress > Maintain Student SAP Data

Student SAP

Term 2233 SPRING 2023 Updated
 Program PRFTC Professional Technical User ID
 Plan ACTVCAPT Graphic Design AAS

Calc SAP Status MEET Meets SAP

Override SAP Status

Packaging Status Summary Meeting Satis Acad Progress [View Packaging Status Summary](#)

Comments

SAP Calculation Results

| Test | Used | Actual | Rule Range From | Rule Range To | Failed | Status | Severity | Exception Used | Term |
|-------------------------|------|---------|-----------------|---------------|--------------------------|--------|----------|----------------|------|
| Academic Standing | N | | NA | NA | <input type="checkbox"/> | | | NA | NA |
| Maximum Attempted Units | Y | 137.000 | | | <input type="checkbox"/> | MEET | 10 | N | NA |
| Maximum Attempted Terms | N | | | | <input type="checkbox"/> | | | N | NA |
| Minimum Current GPA | Y | 2.700 | | | <input type="checkbox"/> | MEET | | | NA |
| Minimum Cumulative GPA | Y | 3.030 | | | <input type="checkbox"/> | MEET | | | NA |
| Current Earned Units | Y | 3.000 | | | <input type="checkbox"/> | MEET | | | NA |
| Cumulative Earned Units | Y | 118.000 | | | <input type="checkbox"/> | MEET | 10 | N | NA |
| Two Year GPA | N | 3.030 | | | <input type="checkbox"/> | | | N | NA |

Annotations:
 - 8 legacy remedial units have been excluded as expected (points to 137.000)
 - Student now meets the Maximum Attempted Units Test (points to MEET status)

Steps in the Test Process

1. Review Maximum Attempted Units Test setup for your college

We recommend that all of the check boxes be checked in the **Max Attempted Transfer Unit Criteria** section in SAP Setup. By checking all of these boxes, you are allowing the SAP program to take all forms of transfer units and include them in the Maximum Attempted Units value calculation.

Please also review your college's Max Attempted Units Rules to ensure that they are in alignment with your college's posted SAP policy. Be sure to carefully review this list and ensure that there are no overlapping ranges for each Academic Program/Academic Plan combination. If the ranges overlap, then the SAP process will throw an error and stop processing.

! Always be sure to add a new effective dated row when making changes to SAP setup.

! Configuration changes made in the PQA test environment will **not** be migrated into the production environment.

Image: Maximum Attempted Units Test configurations on SAP Define Set Up Criteria 1 page

Navigation: Set Up SACR > Product Related > Financial Aid > Satisfactory Academic Progress > Define Set Up Criteria >> Criteria 1 tab

Maximum Attempted Units Test

Use Max Attempted Units Test ← Activates the Maximum Attempted Units Test

Max Attempted Units Option

Maximum Attempted Transfer Unit Criteria

Towards GPA No GPA Course Credit
 Test Credit Other Credit TC Units Adjust

Options to include various forms of Transfer Units in the Maximum Attempted Units value calculated by the SAP program

Max Attempted Units Rules Personalize | Find | View All | [Print] | [Export] First 1-5 of 18 Last

| Academic Program | Academic Plan | Attempted MAX Units From | Attempted MAX Units To | SAP Status | | |
|------------------|---------------|--------------------------|------------------------|------------|---|---|
| ACADM | | 113.001 | 135.000 | MAXW | + | - |
| ACADM | | 135.001 | 999.999 | MAXT | + | - |
| ACADM | CHEBCA | 132.001 | 159.000 | MAXW | + | - |
| ACADM | CHEBCA | 159.001 | 999.999 | MAXT | + | - |
| ACADM | CRMHSA | 122.001 | 147.000 | MAXW | + | - |

Range of Maximum Attempted Units this test will apply to

SAP Status to be assigned if student meets these criteria

2. Review Course Exclusions setup for your college

If your college offers ESL courses and they should not be included in the final Cumulative Attempted Units calculation, they will need to be added to the Course Exclusions list in your local SAP Setup.

1. Select the **Exclusions** tab
2. Select the **Spreadsheet** icon to download the full list of courses to exclude that are already configured for your college
3. Review the list and note what changes need to be made
 - Does the Course Type need to be changed to ESL or to Remedial?
 - Should the course be removed?
 - Should more courses be added? What Course Type should they have?
4. Review the Max Units to Exclude values for both ESL and Remedial
 - [greater than 0] - *all* units from courses with that Course Type will be excluded *up to* the maximum amount set here. Any units beyond that number *will* be included in the calculated total Cumulative Attempted Unites value
 - [blank] - *all* units from courses with that Course Type will be excluded from the calculated total Cumulative Attempted Units value
5. Update Course Exclusions for your college as needed

! Always be sure to add a new effective dated row when making changes to SAP setup.

! Configuration changes made in the PQA test environment will **not** be migrated into the production environment.

Image: Course Exclusions configuration for the Maximum Attempted Units Test on Exclusions page

Navigation: Set Up SACR > Product Related > Financial Aid > Satisfactory Academic Progress > Define Set Up Criteria >> Exclusions tab

The screenshot shows the 'Course Exclusions' configuration page. At the top, there is a section 'Course Exclusions' with a checkbox 'Use Course Exclusion' checked. Below this is the 'Max Units to Exclude' section with two input fields: 'Max ESL Units to Exclude' and 'Max Remedial Units to Exclude' (set to 45.00). A table titled 'Course Exclusions' lists courses with columns for Course ID, Offer Nbr, Course Type, and units. Callouts provide additional context: 'Use Course Exclusion' activates the test; 'Max Units to Exclude' is the limit based on course type; the table lists courses to be excluded; and the 'Course Type' column options correspond to the exclusion configurations.

| *Course ID | *Offer Nbr | *Course Type | |
|------------|------------|--------------|-----|
| 062065 | 1 | Remedial | |
| 062072 | 1 | Remedial | |
| 062073 | 1 | Remedial | + - |
| 062082 | 1 | Remedial | + - |
| 062104 | 1 | Remedial | + - |

3. Define test scenarios

In Scope for Testing:

- Maximum Attempted Units Test
- Students with non-converted, manually entered legacy units for courses listed in the local college Course Exclusions configuration

Out of Scope for Testing:

- Other SAP Tests
- Students with converted legacy units – these are already being excluded as desired per the local college Course Exclusions configuration

Other Questions to Consider

- Do your college's configurations align with your college's posted SAP policy?
- Does this customization align with your college's SAP policy?
- Does this customization present new scenarios that need to be accounted for?
- Think of students that are often manually adjusted after SAP has been run – can they be resolved with this customization?

Recommended Test Scenarios

- Student with only enrolled courses to exclude
- Student with only legacy courses to exclude
- Student with both enrolled and legacy courses to exclude
- Student with no courses to exclude
- Student with ESL or Remedial or both Course Types to exclude
- Student who has exceeded the Max Remedial Units to Exclude value

4. Find test students

- Review the [Recommended Test Scenarios](#) section of this guide to ensure there are at least 2 to 3 students (although more than 3 is recommended) per scenario.
- Use [Query Viewer](#) or [Schedule Query](#) to run the query **QCS_FA_TEST_SAP6B_STDNTS** to capture students and relevant data for the test scenarios for this customization.
- Test for other data conditions beyond just those impacted by the customization itself to ensure that the program changes did not adversely affect other students' SAP Test results.
- If your college does not have a student that meets specific criteria you can work with the FA Support Team to determine if another college is covering this scenario or determine how to stage a student that meets those criteria.

Run query to find students for testing

The **QCS_FA_TEST_SAP6B_STDNTS** testing query selects students who have failed the Maximum Attempted Units Test and have manually entered legacy units that likely should be excluded from the Maximum Attempted Units value with the customization. In the query output, you can find the student ID, the SAP calculation term, what the calculated Maximum Attempted Units value is, and the units range that the student failed on.

Image: Example of test query output for identifying students to test with for SAP #6B

Navigation: Reporting Tools > Query > Query Viewer

QCS_FA_TEST_SAP6B_STDNTS - SAP6B - Test Students

*Institution WA

*SAP Term 2233

View Results

Download results in: Excel Spreadsheet CSV Text File XML File (1 kb)

View All

First 1-12 of 12 Last

| Row | ID | Institution | Career | SAP Term | Maximum Attempted Units | Attempted MAX Units From | Attempted MAX Units To | MAX Attempted Unit Test In Use | Max Attempted Units SAP Status | Attempted Units Failed? | Exception Used | SAP Evaluation Term |
|-----|----|-------------|--------|----------|-------------------------|--------------------------|------------------------|--------------------------------|--------------------------------|-------------------------|----------------|---------------------|
| 1 | 20 | WA | UGRD | 2233 | 210.000 | 135.001 | 999.999 | Y | MAXT | Y | N | 2231 |
| 2 | 20 | WA | UGRD | 2233 | 145.000 | 144.001 | 999.999 | Y | MAXT | Y | N | 2231 |
| 3 | 20 | WA | UGRD | 2233 | 150.000 | 135.000 | 999.999 | Y | MAXT | Y | N | 2231 |
| 4 | 20 | WA | UGRD | 2233 | 165.000 | 135.001 | 999.999 | Y | MAXT | Y | N | 2231 |
| 5 | 20 | WA | UGRD | 2233 | 192.000 | 135.000 | 999.999 | Y | MAXT | Y | N | 2231 |
| 6 | 20 | WA | UGRD | 2233 | 174.000 | 135.001 | 999.999 | Y | MAXT | Y | N | 2221 |
| 7 | 20 | WA | UGRD | 2233 | 180.000 | 135.000 | 999.999 | Y | MAXT | Y | N | 2221 |
| 8 | 20 | WA | UGRD | 2233 | 167.000 | 135.000 | 999.999 | Y | MAXT | Y | N | 2231 |
| 9 | 20 | WA | UGRD | 2233 | 209.000 | 137.001 | 999.999 | Y | MAXT | Y | N | 2231 |
| 10 | 20 | WA | UGRD | 2233 | 222.000 | 140.001 | 999.999 | Y | MAXT | Y | N | 2231 |
| 11 | 20 | WA | UGRD | 2233 | 150.000 | 143.001 | 999.999 | Y | MAXT | Y | N | 2227 |
| 12 | 20 | WA | UGRD | 2233 | 174.000 | 135.001 | 999.999 | Y | MAXT | Y | N | 2223 |

 This query is for testing only and will not be migrated to the production environment.

If your college does not currently use the Maximum Attempted Units Test

The **QCS_FA_TEST_SAP6B_STDNTSNOMAXT** testing query selects students who have manually entered legacy units that likely should be excluded from the Maximum Attempted Units value with the customization. This query does not look for students who have failed the Maximum Attempted Units Test, since there will not be any if your college has not had that test enabled on the SAP Define Set Up Criteria page.

If your college has not been using the Maximum Attempted Units Test, then you can expect your query results to look like the below screenshot, where there are no values in the columns to the right of the "SAP Term" column. the "MAX Attempted Unit Test In Use" column will display an "N" for students whose records you are reviewing where the Maximum Attempted Units Test was not enabled or calculated at the time that SAP was processed for that term.

Image: Example of test query output for identifying students to test with for SAP #6B if your college does not currently use the Maximum Attempted Units test

Navigation: Reporting Tools > Query > Query Viewer

QCS_FA_TEST_SAP6B_STDNTSNOMAXT - SAP6B - Test Students no MAXT

*Institution
 *Term

Download results in: [Excel Spreadsheet](#) [CSV Text File](#) [XML File](#) (15 k)

View All First 1-100 of 115 Last

| Row | ID | Institution | Career | SAP Term | Maximum Attempted Units | Attempted MAX Units From | Attempted MAX Units To | MAX Attempted Unit Test In Use | Max Attempted Units SAP Status | Attempted Units Failed? | Exception Used |
|-----|----|-------------|--------|----------|-------------------------|--------------------------|------------------------|--------------------------------|--------------------------------|-------------------------|----------------|
| 1 | 20 | WA | UGRD | 2233 | 0.000 | 0.000 | 0.000 | N | | N | N |
| 2 | 20 | WA | UGRD | 2233 | 0.000 | 0.000 | 0.000 | N | | N | N |
| 3 | 20 | WA | UGRD | 2233 | 0.000 | 0.000 | 0.000 | N | | N | N |
| 4 | 20 | WA | UGRD | 2233 | 0.000 | 0.000 | 0.000 | N | | N | N |
| 5 | 20 | WA | UGRD | 2233 | 0.000 | 0.000 | 0.000 | N | | N | N |
| 6 | 20 | WA | UGRD | 2233 | 0.000 | 0.000 | 0.000 | N | | N | N |
| 7 | 20 | WA | UGRD | 2233 | 0.000 | 0.000 | 0.000 | N | | N | N |
| 8 | 20 | WA | UGRD | 2233 | 0.000 | 0.000 | 0.000 | N | | N | N |
| 9 | 20 | WA | UGRD | 2233 | 0.000 | 0.000 | 0.000 | N | | N | N |
| 10 | 20 | WA | UGRD | 2233 | 0.000 | 0.000 | 0.000 | N | | N | N |
| 11 | 20 | WA | UGRD | 2233 | 0.000 | 0.000 | 0.000 | N | | N | N |
| 12 | 20 | WA | UGRD | 2233 | 0.000 | 0.000 | 0.000 | N | | N | N |
| 13 | 20 | WA | UGRD | 2233 | 0.000 | 0.000 | 0.000 | N | | N | N |
| 14 | 10 | WA | UGRD | 2233 | 0.000 | 0.000 | 0.000 | N | | N | N |
| 15 | 20 | WA | UGRD | 2233 | 0.000 | 0.000 | 0.000 | N | | N | N |

Annotations in the screenshot:
 - A box labeled "SAP Term calculated" points to the Term input field.
 - A box labeled "'N' indicates that the Maximum Attempted Units Test was not enabled when these SAP results were produced" points to the 'MAX Attempted Unit Test In Use' column.
 - A box labeled "These values will be 0.000 or 'N' if the Maximum Attempted Units Test was not enabled when these SAP results were produced" points to the 'Maximum Attempted Units', 'Attempted MAX Units From', 'Attempted MAX Units To', and 'MAX Attempted Unit Test In Use' columns.

 This query is for testing only and will not be migrated to the production environment.

5. Run query for information on manually entered legacy data

The **QCS_FA_TEST_SAP6B_LEGACY_DATA** testing query selects the manually entered legacy units for the prompted Institution on the transfer credit table prior to the SAP term being calculated for the student ID entered into the prompt.

- Review the query for any courses that are remedial or ESL and should be excluded.
- Take note of the Subject and Catalog values for these courses.
- Take note of the Unit Taken value, as this is the amount that the Maximum Attempted Units value should be reduced by.

In the screenshot below, four rows have been highlighted as example courses that most likely be configured as Remedial in the Course Exclusions configuration. If these courses do exist on that setup, then we can expect that the customization will reduce the Maximum Attempted Units value by the sum of the units in these rows *up to* the Max Units to Exclude values in the configuration.

Image: Example of test query output for reviewing manually entered legacy transfer data

Navigation: Reporting Tools > Query > Query Viewer

QCS_FA_TEST_SAP6B_LEGACYDATA - SAP6B - Legacy Data

*Institution WA
 *Career Undergraduate
 *Term 2233
 *ID 20
 View Results

SAP Term calculated
 Test student ID

Key information for determining how many legacy units should be excluded from the Maximum Attempted Units value

Download results in: Excel Spreadsheet CSV Text File XML File (11 kb)

View All First 1-42 of 42 Last

| Row | ID | Institution | Career | Term | Class Nbr | Course ID | Repeat | Source | Subject | Catalog | Grade In | Unit Taken | Crd Pct/Unit | Grading | Eqv Crs | Allowed Unit | Allow Comp | Repeatable | Attempt | |
|-----|----|-------------|--------|------|-----------|-----------|--------|----------|---------|---------|----------|------------|--------------|---------|---------|--------------|------------|------------|---------|---|
| 1 | 20 | WA | UGRD | 1927 | 3 | 103773 | | TRNS_CRS | BUSN | 121 | 3.3 | 5.00 | 3.300 | GRD | 05007 | 05007 | 5.00 | 1 | N | 1 |
| 2 | 20 | WA | UGRD | 1955 | 2 | 103821 | | TRNS_CRS | BUSN | 216 | 3.3 | 4.00 | 3.300 | GRD | | 103821 | 5.00 | 1 | N | 1 |
| 3 | 20 | WA | UGRD | 1941 | 1 | 108049 | | TRNS_CRS | CSCI | 105 | 3.0 | 3.000 | 3.000 | GRD | | 108049 | 3.00 | 1 | N | 1 |
| 4 | 20 | WA | UGRD | 1927 | 2 | 109902 | | TRNS_CRS | LEGAL | 100 | CR | 1.00 | 2.000 | GRD | 05209 | 05209 | 5.00 | 1 | N | 1 |
| 5 | 20 | WA | UGRD | 1927 | 1 | 109904 | | TRNS_CRS | LEGAL | 101 | 1.8 | 4.00 | 1.800 | GRD | | 109904 | 3.00 | 1 | N | 1 |
| 6 | 20 | WA | UGRD | 1951 | 2 | 109910 | | TRNS_CRS | LEGAL | 105 | 2.8 | 3.00 | 2.800 | GRD | | 109910 | 5.00 | 1 | N | 1 |
| 7 | 20 | WA | UGRD | 1951 | 5 | 109912 | | TRNS_CRS | LEGAL | 106 | 3.5 | 3.00 | 3.500 | GRD | | 109912 | 5.00 | 1 | N | 1 |
| 8 | 20 | WA | UGRD | 1953 | 4 | 109916 | | TRNS_CRS | LEGAL | 119 | 3.3 | 3.00 | 3.300 | GRD | | 109916 | 5.00 | 1 | N | 1 |
| 9 | 20 | WA | UGRD | 1935 | 1 | 109922 | REXP | TRNS_CRS | LEGAL | 140 | 2.4 | 5.00 | 2.400 | GRD | | 109922 | 5.00 | 1 | N | 1 |
| 10 | 20 | WA | UGRD | 1945 | 15 | 109922 | REXP | TRNS_CRS | LEGAL | 140 | 3.5 | 3.00 | 3.500 | GRD | | 109922 | 5.00 | 1 | N | 2 |
| 11 | 20 | WA | UGRD | 1937 | 3 | 109928 | | TRNS_CRS | LEGAL | 199 | 2.9 | 3.00 | 2.900 | GRD | | 109928 | 5.00 | 1 | N | 1 |
| 12 | 20 | WA | UGRD | 1941 | 2 | 109930 | | TRNS_CRS | LEGAL | 200 | 1.5 | 3.00 | 1.500 | GRD | | 109930 | 5.00 | 1 | N | 1 |
| 13 | 20 | WA | UGRD | 1947 | 2 | 104177 | | TRNS_CRS | LEGAL | 204 | 0.0 | 3.00 | 2.000 | GRD | | 104177 | 3.00 | 1 | N | 1 |
| 14 | 20 | WA | UGRD | 1951 | 1 | 104178 | | TRNS_CRS | LEGAL | 205 | 3.4 | 3.00 | 3.400 | GRD | | 104178 | 3.00 | 1 | N | 1 |
| 15 | 20 | WA | UGRD | 1943 | 1 | 104180 | | TRNS_CRS | LEGAL | 211 | 2.8 | 3.00 | 2.800 | GRD | | 104180 | 5.00 | 1 | N | 1 |
| 16 | 20 | WA | UGRD | 1953 | 2 | 104182 | | TRNS_CRS | LEGAL | 213 | 0.7 | 3.00 | 0.700 | GRD | | 104182 | 3.00 | 1 | N | 1 |
| 17 | 20 | WA | UGRD | 1943 | 2 | 104183 | | TRNS_CRS | LEGAL | 215 | W | 3.00 | 0.000 | GRD | | 104183 | 3.00 | 1 | N | 1 |
| 18 | 20 | WA | UGRD | 1953 | 1 | 104184 | | TRNS_CRS | LEGAL | 220 | CR | 3.00 | 2.000 | GRD | | 104184 | 5.00 | 1 | N | 1 |
| 19 | 20 | WA | UGRD | 1955 | 1 | 109936 | | TRNS_CRS | LEGAL | 240 | 3.8 | 4.00 | 3.800 | GRD | | 109936 | 5.00 | 1 | N | 1 |
| 20 | 20 | WA | UGRD | 1953 | 3 | 104190 | | TRNS_CRS | LEGAL | 270 | W | 5.00 | 0.000 | GRD | | 104190 | 5.00 | 1 | N | 1 |
| 21 | 20 | WA | UGRD | 1951 | 4 | 108379 | | TRNS_CRS | MATH | 82 | W | 1.00 | 0.000 | GRD | | 108379 | 5.00 | 1 | N | 1 |
| 22 | 20 | WA | UGRD | 1925 | 3 | 104387 | | TRNS_CRS | OFF | 106 | W | 3.00 | 0.000 | GRD | | 104387 | 3.00 | 1 | N | 1 |
| 23 | 20 | WA | UGRD | 1941 | 3 | 104411 | | TRNS_CRS | OFF | 102 | 3.7 | 5.00 | 3.700 | GRD | | 104411 | 5.00 | 1 | N | 1 |
| 24 | 20 | WA | UGRD | 1925 | 4 | 104439 | | TRNS_CRS | OFF | 214 | 3.3 | 5.00 | 3.300 | GRD | | 104439 | 5.00 | 1 | N | 1 |
| 25 | 20 | WA | UGRD | 1947 | 3 | 104442 | | TRNS_CRS | OFF | 217 | 3.6 | 5.00 | 3.600 | GRD | 05062 | 05062 | 5.00 | 1 | N | 1 |
| 26 | 20 | WA | UGRD | 1937 | 4 | 104444 | | TRNS_CRS | OFF | 219 | 3.6 | 5.00 | 3.600 | GRD | | 104444 | 5.00 | 1 | N | 1 |
| 27 | 20 | WA | UGRD | 1951 | 3 | 107585 | | TRNS_CRS | PE | 104 | W | 1.00 | 0.000 | GRD | | 107585 | 1.50 | 1 | N | 1 |
| 28 | 20 | WA | UGRD | 1937 | 2 | 107590 | | TRNS_CRS | PE | 110 | W | 1.00 | 0.000 | GRD | | 107590 | 1.00 | 1 | N | 1 |
| 29 | 20 | WA | UGRD | 1937 | 2 | 110412 | | TRNS_CRS | PE | 114 | 3.5 | 1.00 | 3.500 | GRD | | 110412 | 1.00 | 1 | N | 1 |
| 30 | 20 | WA | UGRD | 1951 | 12 | 110416 | | TRNS_CRS | PE | 123 | 0.0 | 1.00 | 0.000 | GRD | | 110416 | 1.00 | 1 | N | 2 |
| 31 | 20 | WA | UGRD | 1933 | 4 | 110416 | | TRNS_CRS | PE | 123 | 3.7 | 1.00 | 3.700 | GRD | | 110416 | 1.00 | 1 | N | 1 |
| 32 | 20 | WA | UGRD | 1931 | 3 | 107614 | | TRNS_CRS | PE | 134 | 3.4 | 1.00 | 3.400 | GRD | | 107614 | 1.00 | 1 | N | 1 |
| 33 | 20 | WA | UGRD | 1943 | 3 | 107690 | | TRNS_CRS | PE | 223 | W | 1.00 | 0.000 | GRD | | 107690 | 1.00 | 1 | N | 1 |
| 34 | 20 | WA | UGRD | 1931 | 1 | 108902 | | TRNS_CRS | POLS | 120 | 3.1 | 5.00 | 3.100 | GRD | 05211 | 05211 | 5.00 | 1 | N | 1 |
| 35 | 20 | WA | UGRD | 1933 | 1 | 108936 | | TRNS_CRS | POLS | 295 | 3.3 | 5.00 | 3.300 | GRD | | 108936 | 5.00 | 1 | N | 1 |
| 36 | 20 | WA | UGRD | 1933 | 2 | 109098 | | TRNS_CRS | PSYCH | 129 | 3.3 | 5.00 | 3.300 | GRD | | 109098 | 5.00 | 1 | N | 1 |
| 37 | 20 | WA | UGRD | 1925 | 1 | 109554 | | TRNS_CRS | READ | 57 | CR | 3.00 | 2.000 | GRD | | 109554 | 5.00 | 1 | N | 1 |
| 38 | 20 | WA | UGRD | 1927 | 4 | 109573 | | TRNS_CRS | READ | 91 | CR | 1.00 | 2.000 | GRD | | 109573 | 5.00 | 1 | N | 1 |
| 39 | 20 | WA | UGRD | 1947 | 1 | 103243 | | TRNS_CRS | SPECH | 100 | 3.2 | 5.00 | 3.200 | GRD | 05098 | 05098 | 5.00 | 1 | N | 1 |
| 40 | 20 | WA | UGRD | 1925 | 2 | 103350 | | TRNS_CRS | WRIT | 93 | CR | 3.00 | 2.000 | GRD | | 103350 | 3.00 | 1 | N | 1 |
| 41 | 20 | WA | UGRD | 1931 | 2 | 109660 | | TRNS_CRS | WRIT | 101 | 3.8 | 5.00 | 3.800 | GRD | 05149 | 05149 | 5.00 | 1 | N | 1 |
| 42 | 20 | WA | UGRD | 1933 | 3 | 109662 | | TRNS_CRS | WRIT | 105 | 3.3 | 5.00 | 3.300 | GRD | 06038 | 06038 | 5.00 | 1 | N | 1 |

 This query is for testing only and will not be migrated to the production environment.

6. Compare legacy units to Course Exclusions setup

Review your college's Course Exclusions setup to confirm that you have accounted for all legacy courses on the student's query output that should be excluded from the final Maximum Attempted Units value calculation.

Image: Course Exclusions configuration for the Maximum Attempted Units Test on Exclusions page

Navigation: Set Up SACR > Product Related > Financial Aid > Satisfactory Academic Progress > Define Set Up Criteria >> Exclusions tab

Course Exclusions

Use Course Exclusions

Max Units to Exclude

Max ESL Units to Exclude

Max Remedial Units to Exclude

Take note of the Max Units to Exclude values – these apply to both the legacy units and the student's enrollment data in ctcLink

Course Exclusions Personalize | Find | View All | | First 1-5 of 66 Last

| *Course ID | *Offer Nbr | | | *Course Type |
|------------|------------|-------|----|--------------|
| 062065 | 1 | EFUND | 48 | Remedial |
| 062072 | 1 | ELP | 60 | Remedial |
| 062073 | 1 | ELP | 63 | Remedial |
| 062082 | 1 | HORT | 86 | Remedial |
| 062104 | 1 | HUMAN | 11 | Remedial |

Export the list of courses to exclude to an Excel sheet for looking up courses

7. Process SAP

7a. Manually build SAP for test student

1. Open the Maintain Student SAP Data page for your test student.
Navigation: Financial Aid > Satisfactory Academic Progress > Maintain Student SAP Data
2. Note the Maximum Attempted Units value on the SAP row that Enter the same SAP term and process date that you are testing
3. Set SAP Term and select Calculate button ([QRG - 9.2 Calculating SAP Per Student](#))
4. Note whether or not a new row was added with updated values for the Maximum Attempted Units Test
5. Confirm Maximum Attempted Units value has updated to the expected amount
6. If the Maximum Attempted Units value isn't as expected
 - a. Double check the legacy units for any other courses that might be on the Course Exclusions list
 - b. Check to see if the ESL/Remedial Max Units to Exclude has been exceeded by other courses the student has attempted that are not legacy units

Image: Example student's new Maximum Attempted Units Test outcome with the customization in place

Navigation: Financial Aid > Satisfactory Academic Progress > Maintain Student SAP Data

Student SAP

Term 2233 SPRING 2023 Updated
 Program PRFTC Professional Technical User ID
 Plan ACTVCAPT Graphic Design AAS
 Calc SAP Status MEET Meets SAP
 Override SAP Status

Packaging Status Summary Meeting Satis Acad Progress [View Packaging Status Summary](#)

Comments

SAP Calculation Results

| Test | Used | Actual | Rule Range From | Rule Range To | Failed | Status | Severity | Exception Used | Term |
|-------------------------|------|---------|-----------------|---------------|--------------------------|--------|----------|----------------|------|
| Academic Standing | N | | NA | NA | <input type="checkbox"/> | | | NA | |
| Maximum Attempted Units | Y | 137.000 | | | <input type="checkbox"/> | MEET | 10 | N | NA |
| Maximum Attempted Terms | N | | | | <input type="checkbox"/> | | | N | NA |
| Minimum Current GPA | Y | 2.700 | | | <input type="checkbox"/> | MEET | 10 | N | NA |
| Minimum Cumulative GPA | Y | 3.030 | | | <input type="checkbox"/> | MEET | 10 | N | NA |
| Current Earned Units | Y | 3.000 | | | <input type="checkbox"/> | MEET | 10 | N | NA |
| Cumulative Earned Units | Y | 118.000 | | | <input type="checkbox"/> | MEET | 10 | N | NA |
| Two Year GPA | N | 3.030 | | | <input type="checkbox"/> | | | N | NA |

The new Maximum Attempted Units value has been updated to the anticipated amount

7b. Run SAP in batch or Report Mode

1. Open the "Process SAP" batch processing page
Navigation: Financial Aid > Satisfactory Academic Progress > Process SAP
2. Set the desired Academic Institution, Academic Career, and Term (QRG - [9.2 Process SAP in Batch](#))
3. Uncheck the box for "Don't Run If SAP Status Exists" is unchecked. - For testing, we want the batch SAP Process to update students whose Maximum Attempted Units Tests have already been processed previously to see the outcome in a batch situation with the customization in place.
4. Select the option "Any Calculation Value Change" - Maximum Attempted Units values may be updated by the customization, but still not have an impact on the final SAP Status outcome
5. Select **Run** and **OK**
6. Review the Process Monitor and confirm there are no unexpected or odd error messages (QRG - [Process Scheduler/Process Monitor](#))
7. Review the SAP Report ([Review Report Data section of the 9.2 Process SAP in Batch QRG](#))
8. Review some students with updated Maximum Attempted Units Test results to confirm that they have calculated correctly
9. Ensure that other SAP tests and business processes for your college are not impacted by this customization
10. Spot-check SAP report for anything that looks out of the ordinary

Image: Example of Run Control settings for the Process SAP batch process

Navigation: Financial Aid > Satisfactory Academic Progress > Process SAP

Process SAP

Run Control ID SBCTC_PROCESS_SAP_ALH Report Manager Process Monitor **Run**

Population Selection

Population Selection

Input Parameters

*Academic Institution Highline College

*Academic Career Undergraduate

Term SPRING 2023

Selection Criteria

*Processing Option

Update using most recent evaluation term (Pass 2)

Skip Status and Actions

Don't Run If SAP Status Exists

Update Options

Calc SAP Status Change Only

Any Calculation Value Change

Student Override

Student Override Pers

| ID | Name |
|----|----------------------|
| 1 | <input type="text"/> |

Be sure this box is unchecked. For testing, we want the batch SAP Process to update students whose Maximum Attempted Units Tests have already been processed previously to see the outcome in a batch situation with the customization in place.

Be sure to select this option, as Maximum Attempted Units values may be updated by the customization, but still not have an impact on the final SAP Status outcome.

8. Verify Your Test Outcomes

Success Examples

| Test/Scenario | Expected Outcome |
|--|--|
| Student with only legacy courses to exclude | The Maximum Attempted Units value will be updated by the customization to exclude those Remedial and/or ESL courses that were manually entered up to the defined Max Units to Exclude values in the Course Exclusions configuration. |
| Student with only enrolled courses to exclude | The Maximum Attempted Units value will not be updated by the customization. This value has already been calculated correctly by the Maximum Attempted Units Test based on your college's configurations at the time that SAP was processed for the student and term. |
| Student with both enrolled and legacy courses to exclude | The Maximum Attempted Units value will be updated by the customization to exclude those Remedial and/or ESL courses that were manually entered up to the defined Max Units to Exclude values in the Course |

| Test/Scenario | Expected Outcome |
|--|--|
| | Exclusions configuration. |
| Student with no courses to exclude | The Maximum Attempted Units value will not be updated by the customization. This value has already been calculated correctly by the Maximum Attempted Units Test based on your college's configurations at the time that SAP was processed for the student and term. |
| Student with ESL or Remedial or both Course Types to exclude | The Maximum Attempted Units value is calculated by excluding both Course Types in the Course Exclusions configuration, whether or not this test scenario has been impacted by the customization. |
| Student who has exceeded the Max Remedial Units to Exclude value | The Maximum Attempted Units value is only reduced by the maximum value set in the Max Units to Exclude configuration value for that Course Type. If the Max Units to Exclude value for the Course Type is blank, then any course on the student's record configured with that Course Type on the Course Exclusions configurations will be excluded from the final Maximum Attempted Units value. |

Failure Examples

- Students with an incorrect Maximum Attempted Units value who have manually entered legacy courses to be excluded that exist on the most current effective dated row in the Course Exclusions setup
- Unexpected error message when selecting the Calculate button on the Student SAP page (including SQL error messages)
- Unexpected error messages in Process Monitor (for the Process SAP batch process)

 If the student's SAP won't calculate, you may need to check the student's FA Term and make sure that it has an Active row. (QRG: [9.2 Building an FA Term](#))

Other Useful Pages

The following pages can be used as aids in understanding and calculating the student's expected Maximum Attempted Units value.



Please note that these pages are tied to the Records and Enrollment Module. It is possible that you do not have access to these pages. If you would like access to them for the sake of testing, please reach out to your college's Local Security Administrator (LSA) or Caitlin Stein cstein@sbctc.edu in order to update your security in the CS PQA test environment for testing purposes.

Student Services Center (Student) Academics tab

- The Academics tab in the Student Services Center (Student) page can be used to review courses and unit values at a college by term and program.
- Courses will not be listed for units labeled as "Transfer Credit". They will need to be verified using the Legacy Data test query output.

QRG: [Viewing Student Information](#)

Image: Academics tab in the Student Services Center (Student) to review courses and unit values at a college.

Navigation: Campus Community > Student Services Ctr (Student) >> Academics tab

Example of Student Services Center with transferred units on a term

The screenshot displays the Academics tab for a student. On the left, a tree view shows a list of terms, with '1955 - SUMMER 1995' selected and highlighted. The main content area shows details for 'SUMMER 1995'. A callout box points to the 'From Transfer Credit' column in the 'Statistics' table, with the text 'Attempted units for the term entered as transfer credit'.

| | From Transfer Credit | Cumulative Total |
|-------------------|----------------------|------------------|
| Units Toward GPA: | | |
| Taken | 9.000 | 109.000 |
| Passed | 9.000 | 109.000 |

Image: Academics tab in the Student Services Center (Student) to review courses and unit values at a college.

Navigation: Campus Community > Student Services Ctr (Student) >> Academics tab

Example of Student Services Center with enrolled units on a term

WINTER 2023

Eligible to Enroll Yes
 Primary Program ACADM Academic
 Academic Standing Status Good Standing as of 2023-04-11

Level / Load
 Academic Level - Projected Sophomore
 Academic Level - Term Start Sophomore
 Academic Level - Term End Sophomore
 Approved Academic Load Full-Time
 Academic Load Less than Half-Time

Classes
 Student's course information for the term

Enrolled Dropped Wait Listed

| Class | Description | Units | Grading | Grade | Status |
|------------------------|--|-------|---------|-------|----------|
| BSTEC 105-1YCF (36158) | Intro to Computers & Windows (Lecture) | 3.00 | Graded | | Dropped |
| COL 101-BCF6 (39974) | Strengthening Navigation (Lecture) | 3.00 | Graded | 2.7 | Enrolled |

Quick Enrollment

Statistics
 Attempted units for the term entered on the student's enrollment record

| | From Enrollment | Cumulative Total |
|-------------------|-----------------|------------------|
| Units Toward GPA: | | |
| Taken | 3.000 | 118.000 |
| Passed | 3.000 | 118.000 |

Unofficial Transcript

- Use to view all courses listed on the student's transcript.
- Does not indicate if the course was manually entered legacy transfer data.
- Total attempted units value can be found on the last page. This is a Records and Enrollment calculation, and does not reference the SAP Course Exclusions configurations. In other words, this value is the total attempted units value prior to any remedial or ESL courses have been excluded.

QRG: [View and Print a Student Transcript](#)

Image: *Transcript Request Header tab on the Request Transcript Report page*

Navigation: Records and Enrollment > Transcripts > Request Transcript Report >> Transcript Request Header tab

Transcript Request Header | Transcript Request Detail | Report Messages

Report Request Nbr 002899988 Request Date 10/25/2023 User ID CTC_AHOOVER

Request Attributes

*Institution WA College
 *Transcript Type UNOFF Unofficial Transcript
 Freeze Record
 Override Service Indicator
 Number of Copies 1
 Future Release Immediate Processing
 Academic Career
 Term
 Print Date 10/25/2023
 Request Reason
 Cancel Request

Annotations:
 - Set "Transcript Type" to "UNOFF"
 - Check box to "Override Service Indicator"

Image: Transcript Request Detail tab on the Request Transcript Report page displaying transcripts that have been generated

Navigation: Records and Enrollment > Transcripts > Request Transcript Report >> Transcript Request Detail tab

Transcript Request Header | Transcript Request Detail | Report Messages

Report Request Nbr 002899988 Completed
 Transcript Type UNOFF Unofficial Transcript

Process Request
 Print

Report Manager

| *Seq Nbr | *ID | Name | Number of Copies | Send To | View Report | + | - |
|----------|-----|------|------------------|---------|-------------|---|---|
| 1 | 20 | S | 1 | Send To | View Report | + | - |
| 2 | 20 | T | 1 | Send To | View Report | + | - |
| 3 | 20 | L | | | View Report | + | - |
| 4 | 20 | A | | | View Report | + | - |
| 5 | 20 | A | 1 | Send To | View Report | + | - |
| 6 | 20 | A | 1 | Send To | View Report | + | - |
| 7 | 20 | Y | 1 | Send To | View Report | + | - |
| 8 | 20 | G | 1 | Send To | View Report | + | - |
| 9 | 20 | N | 1 | Send To | View Report | + | - |
| 10 | 20 | B | 1 | Send To | View Report | + | - |

Annotations:
 - Select the "View Report" link to open a PDF of the transcript for the desired student

Save | Return to Search | Previous in List | Next in List | Notify | Add | Update/Display

Transcript Request Header | Transcript Request Detail | Report Messages

Image: Unofficial transcript to view course information on the student's transcript

Navigation: Records and Enrollment > Transcripts > Request Transcript Report >> Transcript Request Detail tab >> View Report link

Example first page of an Unofficial Transcript

Page 1 of 4

Unofficial Transcript - Academic Career

Name: [REDACTED]
 Student ID: 20 [REDACTED]
 Print Date: 10/25/2023

Degrees Awarded

Degree: Associate Degree - Professional Technical
 Confer Date: 09/08/1995
 Plan: Associate of Applied Science - Paralegal

| SUMMER 1992 (06/22/1992 - 09/11/1992) | | | | | | |
|---------------------------------------|----------------------------|-----------|--------|-------|--------|--|
| Course | Description | Attempted | Earned | Grade | Points | |
| OFF | 106 Word Proc Applications | 3.000 | 0.000 | W | 0.000 | |
| OFF | 214 WordPerfect On-Bus-Pc | 5.000 | 5.000 | 3.3 | 16.500 | |
| READ | 87 Individual Read Develop | 3.000 | 3.000 | CR | 0.000 | |
| WRIT | 88 Paragraph/Essay Writing | 3.000 | 3.000 | CR | 0.000 | |
| Term GPA | 3.300 Term Totals | 14.000 | 11.000 | 3.000 | 16.500 | |

| FALL 1992 (09/21/1992 - 12/11/1992) | | | | | | |
|-------------------------------------|---------------------------|-----------|--------|-------|--------|--|
| Course | Description | Attempted | Earned | Grade | Points | |
| BUSN | 121 Practical Accounting | 5.000 | 5.000 | 3.3 | 16.500 | |
| LEGAL | 100 Legal Aest Profession | 1.000 | 1.000 | CR | 0.000 | |
| LEGAL | 101 Intro To Legal System | 4.000 | 4.000 | 1.8 | 7.200 | |
| READ | 91 Study Skills Modules | 1.000 | 1.000 | CR | 0.000 | |
| Term GPA | 2.633 Term Totals | 11.000 | 11.000 | 9.000 | 23.700 | |

| WINTER 1993 (01/04/1993 - 03/19/1993) | | | | | | |
|---------------------------------------|---------------------------|-----------|--------|--------|--------|--|
| Course | Description | Attempted | Earned | Grade | Points | |
| PE | 134 Water Exercise | 1.000 | 1.000 | 3.4 | 3.400 | |
| POLS | 120 American Government | 5.000 | 5.000 | 3.1 | 15.500 | |
| WRIT | 101 Principles of Writing | 5.000 | 5.000 | 3.8 | 19.000 | |
| Term GPA | 3.445 Term Totals | 11.000 | 11.000 | 11.000 | 37.900 | |

| SPRING 1993 (03/29/1993 - 06/10/1993) | | | | | | |
|---------------------------------------|------------------------------|-----------|--------|--------|--------|--|
| Course | Description | Attempted | Earned | Grade | Points | |
| PE | 123 Weight Training | 1.000 | 1.000 | 3.7 | 3.700 | |
| POLS | 295 Independent Study | 5.000 | 5.000 | 3.3 | 16.500 | |
| PSYCH | 120 Psych of Human Relations | 5.000 | 5.000 | 3.3 | 16.500 | |
| WRIT | 105 Research/Persuasive Writ | 5.000 | 5.000 | 3.3 | 16.500 | |
| Term GPA | 3.325 Term Totals | 16.000 | 16.000 | 16.000 | 53.200 | |

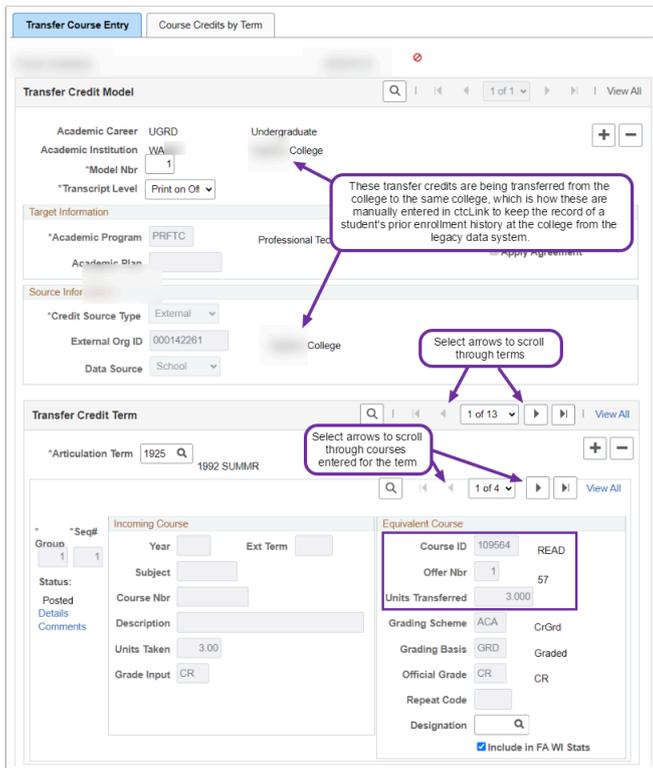
Transfer Course Credit - Manual

- Can be used to review manually entered legacy transfer unit information.
- Lists the term, subject, catalog number, and units taken.
- Transfer credits with an Academic Institution and External Org ID for the same college are legacy enrollment at the college that have been manually entered as transfer units.

QRG: [Convert Legacy Coursework section of the Manual Conversion of Legacy Records QRG](#) (Review this section of the QRG to better understand the recommended manual conversion process.)

Image: *Example of manually entered legacy enrollment on a student's transfer credit record*

Navigation: Records and Enrollment > Transfer Credit Evaluation > Course Credit - Other >> Transfer Course Entry tab



Student Term History, Cumulative Statistics tab

- Can be used to identify the total number of attempted units before Course Exclusions will be applied by the SAP process.

PeopleBooks - [Viewing Student Statistics](#) ("Viewing Cumulative Statistics for Multiple Terms" and "Calculating Cumulative Statistics Values" sections)

Image: Cumulative Statistics page for an example student

Navigation: Records and Enrollment > Student Term Information > Term History >> Cumulative Statistics tab

Term Statistics | **Cumulative Statistics** | Term Withdrawal | Session Withdrawal | Academic Standing >

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Academic Career: Undergraduate

Institution: College
Term: 2231 WINTER 2023

Academic Level - Term End: Sophomore
Reset Cum Stats at Term Start:

Enrollments

| | Graded Units | Grade Points | GPA | Earned Units | In Progress Units | Units Taken Towards Acad Load | Units Earned Towards Acad Load | Units Taken For Audit |
|-------------|--------------|--------------|-------|--------------|-------------------|-------------------------------|--------------------------------|-----------------------|
| For GPA | 9.000 | 17.600 | 1.960 | 9.000 | 0.000 | 9.000 | 9.000 | 0.000 |
| Not For GPA | 0.000 | | | 0.000 | 0.000 | | | |

Transfer Credit

| | Graded Units | Grade Points | GPA | Earned Units | In Progress Units | Graded Transfer Units GPA / No GPA For Units Only | Units Adjustment | >>> Total Adjusted Transferred Units |
|-------------|--------------|--------------|-------|--------------|-------------------|---|------------------|--------------------------------------|
| For GPA | 109.000 | 340.200 | 3.120 | 109.000 | | 136.000 | 0.000 | 136.000 |
| Not For GPA | 27.000 | | | 11.000 | | 0.000 | 0.000 | |

Combined (Enrollment + Transfer Credit Units)

| | Graded Units | Grade Points | GPA | Earned Units | In Progress Units | Combined Earned Units GPA / No GPA Transfer Credit For Units Only | Transfer Credit Units Adjustment | >>> Total Cumulative Units |
|-------------|--------------|--------------|-------|--------------|-------------------|---|----------------------------------|----------------------------|
| For GPA | 118.000 | 357.800 | 3.030 | 118.000 | 0.000 | 129.000 | 0.000 | 129.000 |
| Not For GPA | 27.000 | | | 11.000 | 0.000 | 0.000 | 0.000 | |

Select arrows to scroll through until you have found the term and institution used by the SAP process for your test student.

Combine these two numbers to determine the total Attempted Units before Course Exclusions will be applied by the SAP process.

Total units taken as of the term on this row on the student's enrollment record for this college.

Total units taken on the student's transfer credit record entered for this college and up through this term. This is assuming that all boxes are checked for the Maximum Attempted Transfer Unit Criteria in your college's local Maximum Attempted Units Test configurations in SAP Define Set Up Criteria.

Related Quick Reference Guide Materials

- [9.2 Calculating SAP Per Student](#)
- [9.2 Maintain Student SAP Data](#)
- [9.2 Process SAP in Batch](#)
- [9.2 Processing Standard SAP in Batch Video \(For Reference Only - Does Not Specifically Address Oracle Bug\)](#)
- [Manual Conversion of Legacy Records](#)

Security Matrix Mapping Information

! The information below provides those completing the Security Matrix Mapping templates with the Menus, Pages and Role names needed to execute the User Acceptance Testing relevant to this UAT guide.

Running SAP via Batch Process:

- MENU: Main Menu > Financial Aid > Satisfactory Academic Progress > Process SAP
- ROLE NAMES: ZC FA Funct Analyst and ZZ FA SAP Prcs

Running SAP via Maintain Student SAP Data page:

- MENU: Main Menu>Financial Aid>Satisfactory Academic Progress>Maintain Student SAP Data
- ROLE NAMES: ZC FA Funct Analyst and ZZ FA SAP Prcs